

PROCESS

Gifts and Bequest Fund requests are submitted in memorandum form [see **Attachment 1**]. If post approval is requested, a late justification memo [see **Attachment 2**] should accompany the package explaining why the authorization could not be obtained prior to using the funds. The process follows:

- 1) Staff/Line Offices submit to Business Management Fund Division (BMFD) by fax [202-482-0295] and mail [BMFD/OFA34, HCHB 6013] the signed version of the Gifts and Bequest Request memorandum to the CFO [**Attachment 1**] and justification if applicable [**Attachment 2**] including the following information:
 - Why the Gifts and Bequests Funds are being requested, including a clear description of the activity, product, or service being provided.
 - A summary of itemized cost estimate.
 - Method of payment to vendor (i.e., Credit Card – Impact or Personal, or Personal Check).
 - How the request will aid or facilitate the work of NOAA.
 - Why existing Staff or Line Office resources cannot be used instead of the Gifts and Bequests Fund.
 - Whether additional resources other than the Gifts and Bequests Fund, NOAA or otherwise, are being used.
 - The dates and nature of the event, planned location, number of persons invited, and guest list specifying government and non-government attendees.
 - Whether requests involves official travel of government employees.
 - The consequences of not receiving the requested funding; and a point of contact (POC) that can respond to questions that arise during the review by the Office of Budget and/or Office of the Under Secretary for Oceans and Atmosphere.
- 2) The Business Management Fund Division (BMFD) reviews the request for compliance based upon the guidelines noted above and the availability of funds.
- 3) If required, the POC will be contacted for additional information.
- 4) Pursuant to the compliance of the prescribed guidelines and the availability of resources, BMFD completes a Request for Authorization by Primary Operating Unit for Official Entertainment, Form CD-464, for review and approval by the NOAA CFO and the Under Secretary's Chief of Staff or designated official.
- 5) A BMFD staffer will notify the Staff/Line Office whether the request has been approved or denied.
- 6) If approved, the Staff/Line Office will be notified that funding is available.

If you have any questions concerning this matter, please contact Marietta Hendricks, Business Management Fund Division, Office of Budget, at 202-482-2699 or 2168.